

**MAIL TO:**

STATE OF UTAH  
 DIVISION OF PURCHASING  
 3150 STATE OFFICE BUILDING, STATE CAPITOL  
 P.O. BOX 141061  
 SALT LAKE CITY, UTAH 84114-1061  
 TELEPHONE (801) 538-3026  
<http://purchasing.utah.gov>

**Request for Proposal**Solicitation Number: **NO4070**Due Date: **03/12/04 at 3:00 P.M.**

Date Sent: February 23, 2004

**Agency Contract**

Goods and services to be  
 purchased:

**AGENCY CONTRACT - INTEGRATED MARKETING STRATEGY FOR THE UTAH ENERGY OFFICE TO  
 DEVELOP AND IMPLEMENT THE 2004 POWERFORWARD PUBLIC EDUCATION AND MARKETING  
 CAMPAIGN**

**Please complete**

Company Name		Federal Tax Identification Number	
Ordering Address	City	State	Zip Code
Remittance Address (if different from ordering address)	City	State	Zip Code
Type <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Government	Company Contact Person		
Telephone Number (include area code)	Fax Number (include area code)		
Company's Internet Web Address	Email Address		
Discount Terms (for bid purposes, bid discounts less than 30 days will not be considered)	Days Required for Delivery After Receipt of Order (see attached for any required minimums)		
<p>The following documents are included in this solicitation: Solicitation forms, instructions and general provisions, and specifications. <u>Please review all documents carefully before completing.</u></p> <p>The undersigned certifies that the goods or services offered are produced, mined, grown, manufactured, or performed in Utah. Yes ____ No _____. If no, enter where produced, etc. _____</p>			
Offeror's Authorized Representative's Signature		Date	
Type or Print Name		Position or Title	

**STATE OF UTAH  
DIVISION OF PURCHASING**

**Request for Proposal**

**Solicitation Number: NO4070**

**Due Date: 03/12/04**

---

**Vendor Name:**

---

**AGENCY CONTRACT - CARRY OUT AN INTEGRATED MARKETING STRATEGY FOR THE UTAH ENERGY OFFICE TO DEVELOP AND IMPLEMENT THE 2004 POWERFORWARD PUBLIC EDUCATION AND MARKETING CAMPAIGN, TO INCLUDE, BUT NOT LIMITED TO, CAMPAIGN OVERSIGHT, CREATION AND PLACEMENT OF TELEVISION, RADIO, AND/OR PRINT ADVERTISING, WRITING AND SUBMITTING PRESS RELEASES, COORDINATING MEDIA AND PUBLIC EDUCATION EVENTS, AND DESIGN AND DEVELOPMENT OF COLLATERAL MATERIALS THAT PROMOTE THE MISSION OF POWERFORWARD.**

QUESTIONS ON SPECIFICATIONS CALL LISA YODER AT (801) 538-4761.  
QUESTIONS ON PURCHASING PROCESS (NOT RELATE TO QUESTIONS ) CONTACT NANCY ORTON AT (801) 538-3148.  
RX: 560 40000000011  
COMMODITY CODY: 91876

## REQUEST FOR PROPOSAL - INSTRUCTIONS AND GENERAL PROVISIONS

**1. PROPOSAL PREPARATION:** (a) All prices and notations must be in ink or typewritten. (b) Price each item separately. Unit price shall be shown and a total price shall be entered for each item bid. (c) Unit price will govern, if there is an error in the extension. (d) Delivery time of services and products as proposed is critical and must be adhered to. (e) All products are to be of new, unused condition, unless otherwise requested in this solicitation. (f) Incomplete proposals may be rejected. (g) This proposal may not be withdrawn for a period of 60 days from the due date. (h) Where applicable, all proposals must include complete manufacturer's descriptive literature. (i) By signing the proposal the offeror certifies that all of the information provided is accurate, that they are willing and able to furnish the item(s) specified, and that prices offered are correct.

**2. SUBMITTING THE PROPOSAL:** (a) The proposal must be signed in ink, sealed, and if mailed, mailed in a properly-addressed envelope to the DIVISION OF PURCHASING, 3150 State Office Building, Capitol Hill, Salt Lake City, UT 84114-1061. **The "Solicitation Number" and "Due Date" must appear on the outside of the envelope.** (b) Proposals, modifications, or corrections received after the closing time on the "Due Date" will be considered late and handled in accordance with the Utah Procurement Rules, section 3-209. (c) **Your proposal will be considered only if it is submitted on the forms provided by the state. Facsimile transmission of proposals to DIVISION will not be considered.** (d) All prices quoted must be both F.O.B. Origin per paragraph 1.(c) and F.O.B. Destination. Additional charges including but not limited to delivery, drayage, express, parcel post, packing, cartage, insurance, license fees, permits, costs of bonds, or for any other purpose must be included in the proposal for consideration and approval by the Division of Purchasing & General Services (DIVISION). Upon award of the contract, the shipping terms will be F.O.B. Destination, Freight Prepaid with freight charges to be added to the invoice unless otherwise specified by the DIVISION. No charge for delivery, drayage, express, parcel post, packing, cartage, insurance, license fees, permits, costs of bonds, or for any other purpose will be paid by the state unless specifically included in the proposal and accepted by DIVISION. (e) By signing the proposal the offeror certifies that all of the information provided is accurate and that he/she offers to furnish materials/services for purchase in strict accordance with the requirements of this proposal including all terms and conditions.

**3. SOLICITATION AMENDMENTS:** All changes to this solicitation will be made through written addendum only. Bidders are cautioned not to consider verbal modifications.

**4. PROPRIETARY INFORMATION:** Suppliers are required to mark any specific information contained in their bid which is not to be disclosed to the public or used for purposes other than the evaluation of the bid. Each request for non-disclosure must be accompanied by a specific justification explaining why the information is to be protected. Pricing and service elements of any proposal will not be considered proprietary. All material becomes the property of the state and may be returned only at the state's option. Proposals submitted may be reviewed and evaluated by any persons at the discretion of the state.

**5. BEST AND FINAL OFFERS:** Discussions may be conducted with offerors who submit proposals determined to be reasonably susceptible of being selected for award for the purpose of assuring full understanding of, and responsiveness to, solicitation requirements. Prior to award, these offerors may be asked to submit best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by a competing offeror.

**6. SAMPLES:** Samples, brochures, etc., when required, must be furnished free of expense to the state and if not destroyed by tests may, upon request made at the time the sample is furnished, be returned at the offeror's expense.

**7. DIVISION APPROVAL:** Contracts written with the State of Utah, as a result of this proposal, will not be legally binding without the written

approval of the Director of the DIVISION.

**8. AWARD OF CONTRACT:** (a) The contract will be awarded with reasonable promptness, by written notice, to the lowest responsible offeror whose proposal is determined to be the most advantageous to the state, taking into consideration price and evaluation factors set forth in the RFP. No other factors or criteria will be used in the evaluation. The contract file shall contain the basis on which the award is made. Refer to Utah Code Annotated 65-56-21. (b) The DIVISION can reject any and all proposals. And it can waive any informality, or technicality in any proposal received, if the DIVISION believes it would serve the best interests of the state. (c) Before, or after, the award of a contract the DIVISION has the right to inspect the offeror's premises and all business records to determine the offeror's ability to meet contract requirements. (d) The DIVISION will open proposals publicly, identifying only the names of the offerors. Proposals and modifications shall be time stamped upon receipt and held in a secure place until the due date. After the due date, a **register** of proposals shall be established. The **register** shall be open to public inspection, but the proposals will be seen only by authorized DIVISION staff and those selected by DIVISION to evaluate the proposals. The proposal(s) of the successful offeror(s) shall be open for public inspection for 90 days after the award of the contract(s). (e) Utah has a reciprocal preference law which will be applied against bidders bidding products or services produced in states which discriminate against Utah products. For details see Section 63-56 20.5 -20.6, Utah Code Annotated.

**9. ANTI-DISCRIMINATION ACT:** The offeror agrees to abide by the provisions of the Utah Anti-discrimination Act, Title 34 Chapter 35, U.C.A. 1953, as amended, and Title VI and Title VII of the Civil Rights Act of 1964 (42 USC 2000e), which prohibit discrimination against any employee or applicant for employment, or any applicant or recipient of services, on the basis of race, religion, color, or national origin; and further agrees to abide by Executive Order No. 11246, as amended, which prohibits discrimination on the basis of sex; 45 CFR 90 which prohibits discrimination on the basis of age, and Section 504 of the Rehabilitation Act of 1973 or the Americans with Disabilities Act of 1990, which prohibits discrimination on the basis of disabilities. Also offeror agrees to abide by Utah's Executive Order, dated March 17, 1993, which prohibits sexual harassment in the workplace. Vendor must include this provision in every subcontract or purchase order relating to purchases by the State of Utah to insure that the subcontractors and vendors are bound by this provision.

**10. WARRANTY:** The contractor agrees to warrant and assume responsibility for all products (including hardware, firmware, and/or software products) that it licenses, contracts, or sells to the State of Utah under this contract for a period of one year, unless otherwise specified and mutually agreed upon elsewhere in this contract. The contractor (seller) acknowledges that all warranties granted to the buyer by the Uniform Commercial Code of the State of Utah applies to this contract. Product liability disclaimers and/or warranty disclaimers from the seller are not applicable to this contract unless otherwise specified and mutually agreed upon elsewhere in this contract. In general, the contractor warrants that: (1) the product will do what the salesperson said it would do, (2) the product will live up to all specific claims that the manufacturer makes in their advertisements, (3) the product will be suitable for the ordinary purposes for which such product is used, (4) the product will be suitable for any special purposes that the State has relied on the contractor's skill or judgement to consider when it advised the State about the product, (5) the product has been properly designed and manufactured, and (6) the product is free of significant defects or unusual problems about which the State has not been warned. Remedies available to the State include the following: The contractor will repair or replace (at no charge to the State) the product whose nonconformance is discovered and made known to the contractor in writing. If the repaired and/or replaced product proves to be inadequate, or fails of its essential purpose, the contractor will refund the full amount of any payments that have been made. Nothing in this warranty will be construed to limit any rights or remedies the State of Utah may otherwise have under this contract.

**11. DEBARMENT:** The CONTRACTOR certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared

ineligible, or voluntarily excluded from participation in this transaction (contract) by any governmental department or agency. If the CONTRACTOR cannot certify this statement, attach a written explanation for review by the STATE.

**12. GOVERNING LAWS AND REGULATIONS:** All State purchases are subject to the Utah Procurement Code, Title 63, Chapter 56 Utah Code Annotated 1953, as amended, and the Procurement Rules as adopted by the Utah State Procurement Policy Board (Utah Administrative Code Section R33). These are available on the Internet at [www.purchasing.utah.gov](http://www.purchasing.utah.gov).

(Revision 14 Mar 2003 - RFP Instructions)

**REQUEST FOR PROPOSAL**  
***Utah Energy Office on behalf of the 2004 PowerForward***  
***Advertising/Marketing/Public Relations Campaign***  
**Solicitation #NO4070**

**PURPOSE OF REQUEST FOR PROPOSAL (RFP)**

The purpose of this request for proposal is to enter into a contract with a qualified firm to carry out an integrated marketing strategy for the Utah Energy Office: develop and implement the 2004 PowerForward Public Education and Marketing Campaign, to include, but not limited to, campaign oversight, creation and placement of television, radio, and/or print advertising, writing and submitting press releases, coordinating media and public education events, and design and development of collateral materials that promote the mission of PowerForward.

This RFP is designed to provide interested offerors with sufficient basic information to submit proposals meeting minimum requirements, but is not intended to limit a proposal's content or exclude any relevant or essential data. Offerors are at liberty and are encouraged to expand upon the specifications to evidence service capability under any agreement.

**BACKGROUND**

PowerForward creates public-private partnerships to engage citizens, utilities, the media and businesses in a campaign to promote an “ethic” of conservation and efficient use of energy to maintain affordable, reliable electricity in Utah.

**Overview**

During its fourth year of activity, PowerForward will evolve from a summer-only program to year-round programming to keep consumer awareness of energy conservation high and to further develop name recognition of PowerForward.

Utah experiences a “dual peak” in electricity demand. Meeting electricity demand during hot summer months and long hours of in door lighting during the winter months creates two high electricity usage seasons. Reducing electricity usage during the summer peak demand period is the most effective way to maintain our utilities’ ability to deliver reliable and affordable supplies of electricity. The winter peak is not as critical.

Residential cooling is the single largest contributor to Utah’s growing summer peak electricity demand. It is also the most expensive power supplied by our utilities and represents the best opportunity to reduce peak demand by improving the efficiency of cooling equipment and reducing electricity demand for residential cooling needs during peak hours.

Lighting is the largest contributor to winter demand for electricity. Increasing the use of high efficiency lighting products in the commercial and residential sectors represents the best opportunity to reduce peak electricity demand during the winter months.

Seasonal programming components will be delivered throughout a year-round public information campaign to embed the ethic of conservation in the hearts of Utah citizens. All of this will be built on the solid foundation of PowerForward's efforts during the past three years.

## **PowerForward Foundation**

- The PowerForward Conservation Alert Network began in 2001 and continues each summer. The Utah Energy Office issues the daily "green, yellow, red" conservation alert to the media for broadcast requesting citizens to reduce electricity consumption on yellow alert days. Information about low-cost and no-cost ways to reduce energy consumption is made available.
- In 2002, PowerForward messaging included reducing electricity consumption through the use of energy efficient compact fluorescent lighting. "Cool Tips" and "Shave the Peak" detailed specific actions to reduce peak electricity demand during the 2003 Summer Cooling Campaign. A four-season strategy is planned for 2004 with an emphasis on summer cooling.
- The PowerForward website originated in 2001 and continues to evolve providing the most current links and information to help reduce electricity demand through energy efficient products and conservation tips.
- The PowerForward partnership conducted a wide range of public events, including a media-covered "PowerForward Kick Off" with guest speaker Governor Leavitt, utility executives and community leaders; public outreach events including Public Power Days, SLC Street Fair; workshops; radio and television coverage of energy-related issues; press releases, and news stories.
- PowerForward compliments Utah Power's energy efficiency and load control programs to reduce summer "peak" that offer financial incentives to residential customers.
- Various ENERGY STAR campaigns offer materials that can be customized to fit with PowerForward's outreach efforts and budget. ENERGY STAR also provides a network of national manufacturers and vendors in the local market to work with in promoting the campaign.

## **2004 PowerForward Goal**

The goal for 2004 is to build on the solid foundation of PowerForward successes to date to strategically plan our key messages and communications strategies to keep moving the energy efficiency and conservation ethic forward.

## **PowerForward Objectives**

1. Reduce energy consumption, particularly summer peak electricity demand by 100 MW average per yellow alert day.
2. Educate the citizenry of Utah about Utah's growing demand for electricity, dual season peak demand, the summer's peak demand hours, and the impact that peak demand has on rates and system reliability.
3. Change purchasing habits of consumers from buying standard efficiency products to purchasing energy efficient products and appliances.
4. Partner with ENERGY STAR, appliance retailers and HVAC vendors to leverage and add value to the partners' energy efficiency and conservation programs.
5. Provide leadership and a public voice for the PowerForward public information campaign.
6. Develop criteria for measuring and measure the effectiveness of campaign efforts.

### **PowerForward Strategies Through the Seasons**

The following program strategies provide an outline for Respondents to develop proposal responses from. At a minimum, PowerForward will conduct a summer cooling campaign. At the maximum, PowerForward will engage in all four seasonal program components. The Respondent's proposal shall be presented in such a way that PowerForward partners can select which seasonal components to implement based on its' cost-effectiveness and its ability to meet the campaign objectives.

#### **Spring Strategies**

- A. Conduct a pre-season air conditioning promotion that coincides with manufacturers' and local vendors' pre-season discounts in March - May 2004. [http://www.energystar.gov/index.cfm?c=heat\\_cool.pr\\_hvac](http://www.energystar.gov/index.cfm?c=heat_cool.pr_hvac)
- B. Participate in the ENERGY STAR Appliance Promotion, April 1 – July 15, 2004. <http://www.energystarpartners.net/opie/applpromo/secure/pr.asp>

#### **Summer Strategies**

- A. PowerForward vehicle wrap featured at summer cooling kick-off event June 1.
- B. Conduct PowerForward's "Shave the Peak" kick-off event and promotion, June 1 – Sept. 15, 2004.
- C. Activate the PowerForward Conservation Alert Network, June 1 – Sept. 15, 04.
- D. Support Utah Power's incentive programs:
  - a. "Cool Cash" <http://www.utahpower.net/Article/Article25681.html>
  - b. "Cool Keeper" <http://www.utahpower.net/Article/Article27734.html>
  - c. "See Ya' Later, Refrigerator" <http://www.utahpower.net/Article/Article28603.html>
- E. Support municipal power suppliers' conservation programs.

#### **Fall/Winter Strategy**

- A. Participate in ENERGY STAR "Change A Light, Change the World" Promotion, Oct. 1 – Nov. 30, 04

[http://www.energystar.gov/index.cfm?c=lighting.pr\\_lighting](http://www.energystar.gov/index.cfm?c=lighting.pr_lighting)

The PowerForward Campaign audience includes the general public, electric utility customers, homeowners, homebuilders, appliance retailers and customers, air conditioning vendors and customers, and light commercial businesses.

### **ISSUING OFFICE AND RFP REFERENCE NUMBER**

The State of Utah Division of Purchasing is the issuing office for this document and all subsequent addenda relating to it, on behalf of The Utah Energy Office. The reference number for the transaction is Solicitation # NO4070. This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.

### **SUBMITTING YOUR PROPOSAL**

One original and five identical copies of your proposal must be received at the State of Utah Division of Purchasing, 3150 State Office Building, Capitol Hill, Salt Lake City, Utah 84114, prior to the closing date and time specified. Proposals received after the deadline will be late and ineligible for consideration.

### **LENGTH OF CONTRACT**

It is anticipated that this RFP may result in a single award contract. The Contract resulting from this RFP will be for a period of one year from date of contract signing.

The contract may be extended beyond the original contract period on an annual basis for up to 6 additional years at the State's discretion and by mutual agreement.

### **PRICE GUARANTEE PERIOD**

All pricing must be guaranteed for entire term of contract. Following the guarantee period, any request for price adjustment must be for an equal guarantee period, and must be made at least 30 days prior to the effective date. Requests for price adjustment must include sufficient documentation supporting the request. Any adjustment or amendment to the contract will not be effective unless approved by the State Director of Purchasing. The State will be given the immediate benefit of any decrease in the market, or allowable discount.

### **STANDARD CONTRACT TERMS AND CONDITIONS**

Any contract resulting from this RFP will include the State's standard terms and conditions. These may be accessed at:

<http://www.purchasing.utah.gov/contractinfo/TermsAgency.pdf>

### **DISCUSSIONS WITH OFFERORS (ORAL PRESENTATION)**

An oral presentation may be required for the top 3-5 finalists at the sole discretion of the



State. If oral presentations are required, we anticipate them to take place on Wednesday, March 24, 2004. Oral presentations will be made at the offerors expense. UEO will require finalists to describe a marketing theme (including advertising mediums recommended and why that/those medium(s) were chosen) highlighting PowerForward's mission throughout each season.

### **PROPRIETARY INFORMATION**

The proposal of the successful offeror(s) becomes public information. Proprietary information can be protected under limited circumstances such as client lists and non-public financial statements. Pricing and service elements are not considered proprietary. An entire proposal may not be marked as proprietary. Offerors must clearly identify in the Executive Summary and mark in the body of the proposal any specific proprietary information they are requesting to be protected. The Executive Summary must contain specific justification explaining why the information is to be protected. Proposals may be reviewed and evaluated by any person at the discretion of the State. All materials submitted become the property of the State of Utah and may be returned only at the State's option.

### **DETAILED SCOPE OF WORK**

The following conditions must be met at a minimum and addressed in your proposal. The company making the successful bid must:

1. Position PowerForward as the leader and public voice on energy efficiency and conservation.
2. Create and execute an integrated statewide marketing strategy that could include web-based marketing, direct mail, public relations, advertising and collateral materials.
  - A. Capitalize on the current look and brand, utilizing the PowerForward logo and Shave the Peak theme.
  - B. Create a public relations strategy that includes elements such as targeted media placements and targeted national promotions occurring in key cities.
  - C. Advise, create and produce publications, displays, exhibits, media materials, video production, mailing pieces and other collateral materials. (Production orders of \$1,000 or more will require at least three written bids from qualified bidders.) Provide estimates of all costs to the Program Coordinator for approval before production is scheduled.
  - D. Supply UEO Program Coordinator with electronic versions of all collateral materials developed and any assistance needed to posting those materials on the PowerForward web site.
3. Create artistic design and coordinate purchase of vehicle wrap featuring PowerForward and PowerForward partners' logos. The Department of Natural Resources will supply the vehicle to be wrapped for the period of at least one year.
4. Coordinate Point of Purchase materials with PowerForward retail partners as

needed to promote seasonal program components.

5. Provide promotional opportunities, cross-promotional partners, consulting and creative input for special projects and events, adjusting strategies as deemed advantageous to current events and mutually agreed upon situational opportunities.
6. Determine and coordinate the production and placement of advertising mediums that will most favorably market the PowerForward Campaign, including, but not limited to advertising special in-store and manufacturer promotions.
7. Cooperatively advertise with vendors and retailers endeavoring to secure the most advantageous rate available by using the bid process whenever possible and/or required. Determine and deliver an efficient media schedule based on consumer demographics. NOTE: All placements must be pre-approved by the Program Coordinator.
8. Secure a fair and equitable price for the production of literature, exhibits, film/video and other materials necessary in servicing the account, emphasizing the use of Utah vendors. Must obtain written bids from suppliers, production companies and other vendors whenever possible.
9. Integrate current weather and news events into PowerForwards' messaging, events, and/or press releases whenever possible.
10. Carry public liability and property damage insurance in the amount of \$50,000 covering all acts under the contract and all acts incidental thereto.
11. Title to creative materials will pass to the state upon payment.
12. Coordinate campaign oversight with UEO's PowerForward Program Coordinator.
13. Evaluate the change in consumer awareness of energy conservation as a result of executing the company's campaign. Describe the evaluation methodology used.

The following seasonal strategies and the successful company's proposal to carry them out will be evaluated by the UEO Program Coordinator and PowerForward partners to determine which seasonal programs will be employed.

**1. Spring program:**

- A. Co-operatively advertise manufacturers' pre-season central air conditioner promotions with HVAC vendors during manufacturers' preseason discount pricing promotions.
- B. Assist HVAC vendors and contractors to disseminate information that illustrates energy and cost savings to be realized by SEER 11 and higher AC systems.
- C. Coordinate with electric utility energy efficiency and conservation programs.
- D. Participate in the national ENERGY STAR appliances promotion.

## **2. Summer program:**

- A. Position PowerForward as a partner with ENERGY STAR, Utah Power, Utah municipal utilities and vendors that sell high efficiency cooling systems in promoting summer cooling programs that reduce summer's peak demand.
- B.** Deliver the following key messages statewide:
  - a. Meeting summer "peak" is the most expensive and critical electric resource need in Utah.
  - b. We're asking energy consumers to help "shave the peak" during the summer months by implementing low-cost or no-cost conservation tips: Cool Tips.
  - c. Reducing the demand for electricity during peak hours translates into improved system reliability and lower costs for consumers.
- C. Enlist the support of broadcast and print media to explain why summer energy efficient air conditioning is important and the "cool things" that PowerForward is doing to reduce peak demand.
- D. Conduct a media event and enlist the support of Governor Walker to kick off the 2004 PowerForward Summer Cooling Campaign and to activate the three-tier PowerForward Alert Network.
- E. Coordinate with statewide television stations, radio broadcasters and print media to include the daily red, yellow or green PowerForward Alert for the day as a tag line in broadcast communications and as a color image in the weather section of newspapers in the following PowerForward partner service territories: Bountiful, Hyrum, Kaysville, Lehi, Logan, Morgan, Mt. Pleasant, Murray, Price, St. George, and Salt Lake City.
- F. Support Utah Power's summer cooling incentives and load reduction programs by including PacifiCorp's "Cool Cash", "Cool Keeper", "See You Later, Refrigerator" programs information in PowerForward media events and public outreach events.
- G. Coordinate and conduct public education and outreach events in support of the summer cooling PowerForward Campaign component.
- H. Conduct a kick-off event for each seasonal program.
- I. Evaluate the increase in consumer awareness of PowerForward and energy conservation between June 1 and Sept. 15, 2004. A description of the evaluation methodology and examples of its accuracy should be included.
- J. Develop and implement a recognition process to acknowledge efforts by municipal utilities to educate their customers about the importance of energy conservation.

## **3. Fall/Winter program:**

- A. Develop a public education/information campaign focused on Utah's growing demand for electricity during the long hours of winter's darkness.
- B. Position PowerForward as the leader and public voice for the public information campaign focused on reducing the winter peak demand for electricity.
- C. Enlist the support of broadcast and print media to explain why CFL should

replace incandescent lighting to reduce winter peak demand.

- D. Contribute news stories that define “winter peak” and explain why energy consumers should make efforts to decrease the load.
- E. Create a brochure that illustrates electricity consumption comparisons between CFL and incandescent lighting and the cost reductions associated with CFL.
- F. Conduct public outreach events to disseminate brochures and conduct workshops to educate target audiences such as the Home Builders Association.
- G. Conduct market analysis of CFL sales in comparison to incandescent lighting sales in select stores.

The UEO Program Coordinator will:

- 1. Approve/disapprove of all aspects of the development and implementation of the marketing campaign.
- 2. Reimburse the cost of mechanical preparation, layouts, art composition, engraving or printed materials, talent, audio and video product accomplished solely for the division and out-of-pocket expenditures necessary to perform pre-approved service.
- 3. Be the contact person for communication with PowerForward partners and ENERGY STAR.

## **PROPOSAL REQUIREMENTS AND COMPANY QUALIFICATIONS**

- 1. List company name, address, phone, fax, web site and contact person for this RFP.
- 2. Give a brief description of your company’s experience in branding and marketing energy efficiency and conservation in or outside of Utah.
- 3. Give a brief description of your company’s experience in marketing any energy efficiency and conservation initiatives or organizations.
- 4. Give us your perception of PowerForward's image within the state and examples of how it could be changed.
- 5. List the major television, radio and print publications with which you have a relationship (ie: placing editorial copy and advertising). If you do not have a public relations emphasis, describe how you would provide a solution to UEO’s public relations needs.
- 6. How would you characterize your organizational culture? Also:
  - a. Provide brief biographies, including relevant work experience of the entire team that

- will be assigned our account. What other account assignments would this person or persons carry? What proportion of their time would be devoted to servicing the Utah account?
- b. List your company's three largest clients, the date of their acquisition, and the proportion of total billings represented by these accounts.
  - c. Provide your most recent financial statement and list any banking reference.
  - d. List and give a background on other principal personnel in your agency.
  - e. List general rates for services.
  - f. Provide examples of your work, including web design, print advertising, direct mail, brochures or other collateral materials.
7. Since the UEO is a state agency and is not-for-profit, we are asking the company to donate some of its time and services. Explain the level of pro-bono work your firm would be willing to supply.

### **PROPOSED TIMELINE FOR RFP**

RFP made available:	February 23, 2004
Deadline for receipt of proposal:	March 12, 2004
Selection Committee Screening:	March 15-18, 2004
Oral Presentation for finalists:	March 24, 2004
Selection Committee's final decision:	March 25, 2004
Contract in Place:	April 1, 2004

### **PROPOSAL RESPONSE FORMAT**

All proposals must be organized and tabbed with labels for the following headings:

1. **RFP Form.** The State's Request for Proposal form completed and signed.
2. **Executive Summary.** The one or two page executive summary is to briefly describe the offeror's proposal. This summary should highlight the major features of the proposal. It must indicate any requirements that cannot be met by the offeror. The reader should be able to determine the essence of the proposal by reading the executive summary. Proprietary information requests should be identified in this section.
3. **Detailed Response.** This section should constitute the major portion of the proposal and must contain at least the following information:
  - A. A complete narrative of the offeror's assessment of the work to be performed, the offeror's ability and approach, and the resources necessary

to fulfill the requirements. This should demonstrate the offeror's understanding of the overall performance expectations. Clearly indicate any options or alternatives proposed.

B. A specific point-by-point response, in the order listed, to each requirement in the RFP.

4. **Cost Proposal.** Cost will be evaluated independently from the technical proposal.

All \$175,000 cost proposals will be grouped and evaluated separately from all \$225,000 cost proposals.

- A. Provide a \$175,000 proposal to execute all four seasonal programs and cost break-outs for each seasonal program component.
- B. Provide a \$225,000 proposal to execute all four seasonal programs and cost break-outs for each seasonal program component.
- C. Include the cost of participation in community outreach events and the associated coordination meetings, the resources to support those events and any promotional items and /or incentives used to attract citizenry.
- D. Please enumerate all costs on the attached Cost Proposal Forms.

### **PROPOSAL EVALUATION CRITERIA**

All of the \$175,000 proposals will be evaluated individually and grouped for direct comparison of the \$175,000 proposals. All of the \$225,000 proposals will be evaluated individually and grouped for direct comparison of the \$225,000 proposals.

A committee will evaluate proposals against the following weighted criteria. Each area of the evaluation criteria must be addressed in detail in proposal.

<b>Weight</b>	<b>Evaluation Criteria</b>
20%	Cost
35%	Demonstrated understanding of the overall performance expectations.
25%	Demonstrated technical capability (proven track record) to meet scope of work.
20%	Performance references for similar projects.

### **ATTACHMENTS:**

Cost Proposal I (\$175,000 cost proposals)

Cost Proposal II (\$225,000 cost proposals)

RFP Evaluation Score Sheet I (\$175,000 proposals)  
RFP Evaluation Score Sheet II (\$225,000 proposals)  
Attachment A  
Attachment B

## **COST PROPOSAL I**

### **2004 PowerForward Campaign**

1. Submit cost to execute the scope of work for each seasonal program component Individually such that the total cost of all four is **\$175,000**. Enter cost proposals in the appropriate space in the table below. Leave space blank if there is no applicable cost.
2. Any deviation from this format may result in disqualification of proposal.

	<b>Spring ENERGY STAR Clothes Washer Promotion</b>	<b>Spring Pre-season HVAC Promotion</b>	<b>Summer Shave the Peak</b>	<b>Fall/Winter ENERGY STAR Change A Light</b>
<b>Campaign oversight, by Public Relations and Marketing Firm</b>	Cost w/ rebates  Cost without rebates			
<b>Vehicle wrap</b>				

Public education and outreach events				
Radio advertising				
Television advertising				
Collateral materials				
Print advertising,				
Survey				
<b>TOTAL OF EACH PROGRAM</b>	With rebates Without rebates			

The ENERGY STAR Clothes washer promotion should be cost quoted in two ways: one that offers a \$50 rebate for the purchase of ENERGY STAR clothes washers and a cost proposal of a program without rebates.

**Combined total of all four individual program costs not to exceed \$175,000.**

## **COST PROPOSAL II**

### **2004 PowerForward Campaign**

1. Submit cost to execute the scope of work for each seasonal program component Individually such that the total cost of all four is **\$225,000**. Enter cost proposals in the appropriate space in the table below. Leave space blank if there is no applicable cost.
2. Any deviation from this format may result in disqualification of proposal.

	<b>Spring ENERGY STAR Clothes Washer Promotion</b>	<b>Spring Pre-season HVAC Promotion</b>	<b>Summer Shave the Peak</b>	<b>Fall/Winter ENERGY STAR Change A Light</b>
<b>Campaign oversight, by Public Relations and Marketing Firm</b>	Cost w/ rebates Cost without rebates			
<b>Vehicle wrap</b>				
<b>Public education and outreach events</b>				



<b>Radio advertising</b>				
<b>Television advertising</b>				
<b>Collateral materials</b>				
<b>Print advertising,</b>				
<b>Survey</b>				
<b>TOTAL OF EACH PROGRAM</b>	With rebates			
	Without rebates			

The ENERGY STAR Clothes washer promotion should be cost quoted in two ways: one that offers a \$50 rebate for the purchase of ENERGY STAR clothes washers and a cost proposal of a program without rebates.

**Combined total of all four individual program costs not to exceed \$225,000.**

# RFP EVALUATION SCORESHEET I (\$175,000 Proposals)

**Utah Energy Office on behalf of the 2004 PowerForward  
Advertising/Marketing/Public Relations Campaign  
# (to be inserted by the Division of Purchasing)**

## RFP Evaluation Score Sheet

**Firm Name:** \_\_\_\_\_.

**Evaluator:** \_\_\_\_\_.

**Date:** \_\_\_\_\_.

Score will be assigned as follows:

0 = Failure, no response

1 = Poor, inadequate, fails to meet requirement

2 = Fair, only partially responsive

3 = Average, meets minimum requirement

4 = Above average, exceeds minimum requirement

5 = Superior

		Score (0-5)	Weight	Points
<b>1. Demonstrated understanding of overall performance expectations.</b>	<b>(35 points possible)</b>	----	----	----
Understanding of PowerForward's mission & brand	15 points possible		X 3	
Consistent theme throughout the seasonal program areas	10 points possible		X 2	
Consideration of promotional opportunities with PowerForward partners & promotional opportunities with others	10 points possible		X 2	
<b>2. Demonstrated technical abilities</b>	<b>(25 points possible)</b>	----	----	----
Examples of multi-media campaign for previous client	10 points possible		X 2	
Examples of past creative work	5 points possible		X 1	
Examples of marketing an intangible product	5 points possible		X 1	
Qualification and expertise of staff	5 points possible		X 1	
<b>3. Performance references for similar projects.</b>	<b>(20 points possible)</b>	----	----	----
Responsiveness to clients' needs	5 points possible		X 1	
Creativity of artwork, ideas for events, sudden opportunities	5 points possible		X 1	
Quality of work (accuracy of ad text, quality of press releases, detailed and timely coordination of events)	10 points possible		X 2	
<b>4. Cost*</b>	<b>(20 points possible)</b>	---	---	<b>* Inserted by Purchasing</b>
<b>TOTAL EVALUATION POINTS OF \$175,000 PROPOSAL</b>	<b>(100 points possible)</b>	---	---	<b>Total</b>

- Purchasing will use the following cost formula: The points assigned to each offerors cost proposal will be based on the lowest proposal price. The offeror with the lowest Proposed Price will receive 100% of the price points. All other offerors will receive a portion of the total cost points based on what percentage higher their Proposed Price is than the Lowest Proposed Price. An offeror who's Proposed Price is more than double (200%) the Lowest Proposed Price will receive no points. The formula to compute the points is: Cost Points x (2- Proposed Price/Lowest Proposed Price).

## RFP EVALUATION SCORESHEET II (\$225,000 Proposals)

**Utah Energy Office on behalf of the 2004 PowerForward  
Advertising/Marketing/Public Relations Campaign  
# (to be inserted by the Division of Purchasing)**

### RFP Evaluation Score Sheet

**Firm Name:** \_\_\_\_\_.

**Evaluator:** \_\_\_\_\_.

**Date:** \_\_\_\_\_.

Score will be assigned as follows:

0 = Failure, no response

1 = Poor, inadequate, fails to meet requirement

2 = Fair, only partially responsive

3 = Average, meets minimum requirement

4 = Above average, exceeds minimum requirement

5 = Superior

		Score (0-5)	Weight	Points
<b>1. Demonstrated understanding of overall performance expectations.</b>	<b>(35 points possible)</b>	----	----	----
Understanding of PowerForward's mission & brand	15 points possible		X 3	
Consistent theme throughout the seasonal program areas	10 points possible		X 2	
Consideration of promotional opportunities with PowerForward & promotional opportunities with others	10 points possible		X 2	
<b>2. Demonstrated technical abilities</b>	<b>(25 points possible)</b>	----	----	----
Examples of multi-media campaign for previous client	10 points possible		X 2	
Examples of past creative work	5 points possible		X 1	
Examples of marketing an intangible product	5 points possible		X 1	
Qualification and expertise of staff	5 points possible		X 1	
<b>3. Performance references for similar projects.</b>	<b>(20 points possible)</b>	----	----	----
Responsiveness to clients' needs	5 points possible		X 1	
Creativity of artwork, ideas for events, sudden opportunities	5 points possible		X 1	
Quality of work (accuracy of ad text, quality of press releases, detailed and timely coordination of events)	10 points possible		X 2	
<b>4. Cost*</b>	<b>(20 points possible)</b>	---	---	<b>* Inserted by Purchasing</b>
<b>TOTAL EVALUATION POINTS OF \$225,000 PROPOSAL</b>	<b>(100 points possible)</b>	---	---	<b>Total</b>

Purchasing will use the following cost formula: The points assigned to each offerors cost proposal will be based on the lowest proposal price. The offeror with the lowest Proposed Price will receive 100% of the price points. All other offerors will receive a portion of the total cost points based on what percentage higher their Proposed Price is than the Lowest Proposed Price. An offeror whose Proposed Price is more than double (200%) the Lowest Proposed Price will receive no points. The formula to compute the points is: Cost Points x (2- Proposed Price/Lowest Proposed Price).

## **Attachment A**

### **PowerForward Partner Programs**

Lowe's Home Improvement Warehouse, in partnership with ENERGY STAR, installed large displays of ENERGY STAR lighting fixtures and compact fluorescent bulbs in three key stores in Utah. PowerForward Utility Partners sponsored the displays in the St. George, Riverdale, and West Valley Lowes' Stores to encourage customers to take the Energy Challenge. The Challenge is a move to educate Utah citizens on ways they can save money and energy when lighting their homes. The lighting displays boast the sponsoring Utility Partner logo and the PowerForward logo in addition to the ENERGY STAR logo.

Utah Power's Cooling Incentive Program: Utah Power launched an incentive-based cooling campaign in the summer of 2003. The program, expected to continue in summer 2004, reinforces the ENERGY STAR campaign, working with HVAC retailers/vendors and targeting individual homeowners who want to upgrade their existing cooling system to a more efficient system. The "Cool Cash" incentive program provides cash incentives to Utah residential electric customers for the purchase and home installation of qualifying evaporative cooling and high-efficiency central air conditioning systems.

In addition to the rebate program, Utah Power launched the "Cool Keeper" direct load control program for residential and small commercial central air conditioning units. Residents and small businesses can voluntarily elect to have remote control devices placed on their central air conditioning units allows PacifiCorp to cycle air conditioning units on and off as needed during the peak demand hours.

ENERGY STAR® "Cool Change" Campaign: ENERGY STAR launched a national "Cool Change" campaign in 2003 targeting homeowners. The focus of the "Cool Change" is to encourage homeowners to replace existing cooling systems that are old, inefficient or in need of costly repairs with more energy-efficient units that have earned EPA's ENERGY STAR label. The program partners with retailers, manufacturers, regional ENERGY STAR partners, equipment contractors, dealers and distributors to install ENERGY STAR qualified cooling systems.

The goal of the 2004 ENERGY STAR Appliance Promotion is to increase market share of ENERGY STAR qualified clothes washers in participating markets, attract media attention, and increase marketing efforts to magnify the ENERGY STAR message by providing rebates for ENERGY STAR qualified clothes washer purchase.

**Attachment B**  
**PowerForward 2003/2004 Timeline**

[illegible]

